Creating a New Project
CREATING A NEW PROJECT

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for creating a new project in Facilities Connect. The Financial administrator will create the new project record, then send it to the Project Manager to complete the details.

The purpose of this document is to serve as guided reference and/or new hire training on creating a new project, available to all applicable users in Facilities Connect.

VERSION INFORMATION (THIS DOCUMENT)

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<th>Release Date</th>
<th>Action</th>
<th>Owner</th>
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<td>07/15/2022</td>
<td>Updated</td>
<td>NU Facilities</td>
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The updated version of the document reflects the changes made to the Project Creation process in conjunction with Capital Projects and Finance departments.

REVISION HISTORY
GETTING STARTED

- To begin, access the Facilities Connect Home Screen

PROCESS

IMPORTANT
1) To begin a new project, locate the Related Links – Projects portlet (left side of screen) and click on Create a Capital Project. 

<<Upon clicking, the Capital Project Form will open in a new window>>
CREATING A NEW PROJECT

2) Begin on the **General** tab of the **Capital Project Form**

- Create a project name by completing the **Name** field; the **Project Reporting Name** field (also a required field) will auto-populate with your **Name** field entry.

  **Note:** All projects must be named using proper project naming conventions. Please refer to the [Project Naming Conventions](#) guide on the Facilities Connect website for guidance and more details.

  **Tip:** The **Date** field will pre-populate with the current date, but can be changed by directly editing the date in the associated content box or by clicking on the calendar icon (immediately to the right).

3) Select the appropriate **Project Category**; use the dropdown arrow to select either **Capitalized** or **Non-Capitalized**.

**IMPORTANT**

The **Project Reporting Name** must match the name in the **Chartstring confirmation email** from the Budget office. If these names do not match, the financials will not match.
CREATING A NEW PROJECT

HOME > CREATE A CAPITAL PROJECT (GENERAL TAB)

4) If Capitalized is selected for Project Category, the Chartstring field will appear on the right side of the screen

**Note:** All Capitalized projects require entry of a project chartstring in order to setup a new project. If you do not have a project chartstring at this time, consult with a Project Director on appropriate next steps.

▼ PROCESS

• All projects must comply with approved Naming Conventions; please refer to the Project Naming Conventions guide on the Facilities Connect website for more details

▼ IMPORTANT
5) Use the Magnifying Glass to search and select your project’s chartstring

<<Upon clicking, a new search window will open>>
6) Use the available Column Headers / Search Fields to sort and filter the list of available chartstrings.
7) Once you have located the desired chartstring, click on the corresponding Radio Button, and then click OK to select <<The selected chartstring will now appear in the Chartstring field>>
8) Next, add the project’s Primary Location
   • From the Primary Location section, click the Find button.

9) Use the available Column Headers / Search Fields to sort and filter the list for a desired location.

   **Note:** If the project’s Primary Location is not a building, lot, or parking garage, use the generic entry of ‘Evanston Campus’ or ‘Chicago Campus’ by searching either value in the Name field.
10) Once you have located the desired location, click on the corresponding Radio Button, and then click OK to select.

Note: Once the Primary Location has been selected, the Site Address and Project Address sections will populate automatically.
11) Next, add the PM Mark Up Fee
   • To locate this portion of the form, click on the Budget tab

12) In the Job Cost Billing section, locate the PM Markup field.
   • Click on the magnifying glass
   <<Upon clicking, the PM Markup Fee options will open in a sub-window>>

13) In the PM Markup window, click the radio button that matches your budget
   • Click on OK to save your selection
14) Next, add the Project Primary Manager and Project Director responsible for the project
   • To locate this portion of the form, click on the Contacts tab

15) In the Contacts section under Role, click on Project Primary Manager
   "(Upon clicking, the Contact Role Detail for the Project Primary Manager will open as a new window)"

16) In the Contact Role Detail window, click the Find button
   "(Upon clicking, a new search window will open)"

▼ IMPORTANT
For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.
17) Use the available Column Headers / Search Fields to sort and filter the list of contacts to locate the desired project manager.

18) Once you have located the desired project manager, click on the corresponding Radio Button, and then click OK to select.

For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.
The selected contact and his/her information will now appear in the Contact section of the Contact Role Detail window.

19) Click on the Save & Close button to confirm the selection; the selected contact will now be displayed beside Project Primary Manager in the Contacts section of the Contacts tab.
The selected Project Primary Manager is now displayed for that role in the Contacts section of the Contacts tab.

20) Next, repeat steps #12-16 to add a contact to the Project Director role.

**IMPORTANT**

For additional information about adding contacts to projects, please refer to the Manage External Contacts OR Contacts Quick Add job guides.
For additional information about adding contacts to projects using the Contacts Quick Add function, please refer to the Contacts Quick Add job guides.
Now that both of the required contacts have been added, you are now able to create a draft of the project.

21) Locate and click the Create Draft button on the upper right of the form.

Upon clicking, a draft of the project will be saved, and the action buttons (upper right of the form) will change to new options.

**Note:** An important, final requirement of new project setup in Facilities Connect is application of a Project Template.

Please continue with the steps #19-22 to ensure a Project Template is properly applied to your project.
To apply a Project Template:

22) From the action buttons (upper right of the form), click on the More button

23) Next, click on the Apply Template option (will appear beneath the More button)

<<Upon clicking, a new search window will open>>

24) Select either the Small or Large Project Template
   - Click on the Radio Button for the chosen template
   - Click the Continue button to confirm the selection

▼ IMPORTANT
   - It is important to save the project as you make any changes using the Save button.
25) Click on the **Save** button to save your project with the applied project template.

**IMPORTANT**

- **DO NOT** Activate the Project. The Project Manager must add their information to the project record before it can be activated.
26) Finally, send the Project Manager an email with the Project ID number and instructions on what information they need to enter.
The saved project is accessible to the PM directly from the *Facilities Connect Home Screen* via:

- The ‘*My Projects*’ Phase portlets (located at the center of the screen), or
- The *My Capital Projects* menu (located on the left side of screen)

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<th>Project Name</th>
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<td>Abbott Hall Second Floor MFA Teaching Studio Buildout 2022</td>
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